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Continuing Education credit — June 2025

As a subscriber to Financial-Planning.com, you can earn up to 12 hours of CE credit from the CFP Board and the Investments & Wealth Institute.

Please read the articles and answer the questions below. To find the related article, click on the hyperlinked title of the story – both online-only articles as well as stories published in the magazine.

You must answer 8 of the 10 questions correctly to qualify for CE credit.

Financial Planning does not email a certificate of completion. Please take a screenshot of the results screen, and keep the confirmation for your records. Financial Planning reports results to the CFP Board weekly. The board may take an additional two weeks to post results.

If you need assistance, please contact our Customer Success Team

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1. According to data from the CFP Board, this percentage of certified financial planners who listed their languages speak only English. *

68%
75%
82%
93%

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2. Among CFPs who reported speaking languages other than English, Spanish was the most common, followed by French, Mandarin and then by what language? *

Arabic
Cantonese
German
Russian

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3. Interval funds can come with high fees tied to leverage margins and "hurdles" based on the level of yield. This could hike the cost to an all-inclusive ratio of this much shaved off the top of a 10% gain? *

2.67%
3.39%
4.9%
6.1%

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4. Which of these proposed SEC rules, dating to the Biden administration, did the agency recently drop? *

A requirement for broker-dealers to inform federal regulators immediately after a cyberattack and to follow up within 48 hours.
A requirement for advisors to eliminate conflicts of interest posed by AI, machine learning systems or sophisticated algorithms used to provide investment advice.
A requirement for advisors to place cryptocurrency, private securities and other alternative assets with banks, brokerages or other third-party custodians.
All of the above

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5. Guitar collectors are drawn to certain “holy grail” models. Which of the following commanded $6,010,000 (the highest auction price to date) at a 2020 auction? *

A 1957 Fender Stratocaster
Kurt Cobain's 1959 Martin D-18E
A pre-World War II Martin acoustic
Taylor Swift’s Koi Fish acoustic

Related Content: Guitars are cool, but how do they play as investments?

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6. What percentage of 3,300 Americans correctly answered at least five out of six questions in a recent retirement survey by the TIAA Institute and the Global Financial Literacy Excellence Center? *

7%
14%

22%
23%

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7. Select the best response to this question from the survey: “Latisha plans to start saving for retirement by setting aside $2,000 this year. Her employer offers a 401(k) plan and fully matches a worker’s contributions up to $5,000 each year. Under which scenario does Latisha have the largest amount in retirement savings at year-end?” *

She contributes $2,000 to the 401(k) plan and invests the money in a mutual fund that earns a 5% return during the year.
She contributes $100 to the 401(k) plan and invests the money in a mutual fund that earns a 5% return during the year.
She contributes $2,000 to an IRA and invests the money in a mutual fund that earns a 5% return during the year.
It does not matter — she will have the same amount of year-end savings either way.

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8. Carlsbad, California boasts the highest average total income for its retiree residents at $85,442. How much of that income is derived from retirement accounts? *

$72,685
$66,685
$56,685
$49,685

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9. Retirees in Naperville, Illinois aren’t far behind, with an annual income of $85,055. Of that sum, what is the average Social Security income they can expect to receive? *

$30,921
$35,921
$40,921

$45,921

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10. What was the fund size of the Bitwise 10 Crypto Index Fund (BITW) — the best-performing crypto ETF in the past year based on annualized return — at the end of May? *

$1.40 billion
$892.2 million
$3.57 billion
$20.70 billion

Related Content: 10 best and worst crypto ETFs of the past year

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